Uzbekistan Seed Overseas Market Analysis Report

Target Country: Uzbekistan | Category: Seeds | Report Updated: July 3, 2026

Uzbekistan Seed Market: Key Conclusions

Uzbekistan's seed market has an import dependency of approximately 45%, with total imports reaching USD 182 million in 2025. China remains the second-largest supplier, holding a 22.3% market share. Vegetable seed imports are growing at over 15%, with strong demand for hybrid varieties. Agricultural modernization policies continue to drive the replacement of traditional farm-saved seeds with high-quality commercial seeds, positioning the market in a strategic expansion phase.

Import Dependency 45.2% ↑ High

2025 Total Imports USD 182M ↑ +11.3%

China Market Share 22.3% ↑ +1.8pct

Vegetable Seed Import Growth +15.7% ↑ High Growth

⚠ Key Risk: The Uzbekistan Som exchange rate is highly volatile, depreciating approximately 4.2% against the USD in H1 2026, pushing up landed costs of imported seeds and potentially dampening procurement willingness among small and medium-sized farmers.

Sources: State Statistics Committee of Uzbekistan 2025 Annual Report; General Administration of Customs of China May 2026 Data; FAO Global Seed Trade Statistics 2025

Supply and Demand Fundamentals

Uzbekistan's total annual seed demand is approximately 68,000 tonnes (including farm-saved seeds), with the commercial seed market at approximately 31,000 tonnes. Domestic commercial seed production is approximately 17,000 tonnes, supplemented by imports of approximately 14,000 tonnes, resulting in a persistent supply-demand gap, particularly in hybrid vegetable seeds and high-quality cotton seeds.

Indicator	2024	2025	YoY Change
Domestic Commercial Output (10k tonnes)	1.58	1.70	+7.6%
Import Volume (10k tonnes)	1.29	1.41	+9.3%
Total Commercial Supply (10k tonnes)	2.87	3.11	+8.4%
Commercial Demand (10k tonnes)	2.90	3.15	+8.6%

Sources: Ministry of Agriculture of Uzbekistan 2025 Annual Agricultural Report; FAO Crop and Seed Statistics Database updated December 2025

China Market Status

China's seed industry has ample production capacity, with hybrid vegetable seed output growing 8.2% year-on-year in 2025. Seed exports to Uzbekistan are predominantly vegetable seeds (tomato, pepper, cucumber) and hybrid rice seeds. From January to May 2026, China's seed exports to Uzbekistan totaled approximately USD 28.6 million, up 17.8% year-on-year.

China Total Seed Output (2025) ~21M tonnes ↑ Stable

Exports to Uzbekistan (Jan-May) USD 28.6M ↑ +17.8%

Key Export Varieties Hybrid Tomato, Pepper, Rice Seeds

Domestic Seed Enterprise Operating Rate ~78% ↑ Steady

Sources: General Administration of Customs of China May 2026 Export Statistics; China Seed Association 2025 Industry Development Report; Longzhong Info June 2026 Agricultural Inputs Weekly

Uzbekistan Market Status

Cotton seeds constitute the largest segment of Uzbekistan's seed market, though vegetable seeds are growing fastest. Import sources are diversified: Turkey is the top supplier (~28%), followed by China (22%), the Netherlands (14%), and Russia (10%). Local commercial seed retail prices carry a premium of approximately 25%-40% over CIF import prices.

Import Source	2025 Share	Main Varieties	YoY Change
Turkey	28.1%	Vegetable Seeds, Cotton Seeds	+2.1pct
China	22.3%	Vegetable Seeds, Rice Seeds	+1.8pct
Netherlands	14.0%	Premium Vegetable Seeds	-0.5pct
Russia	10.2%	Cereal Seeds	-0.3pct

Sources: Customs Committee of Uzbekistan 2025 Trade Statistics Yearbook; Ministry of Agriculture of Uzbekistan Q1 2026 Market Brief

Product Segment Structure

Cotton seeds remain the largest seed segment in Uzbekistan, accounting for 35% of commercial seed demand. Vegetable seeds have rapidly increased to a 28% share, with tomato, pepper, and cucumber seeds together representing 62% of vegetable seed imports. Hybrid rice seed demand is growing at over 20% annually, driven by government promotion programs.

Cotton Seeds 35% Share | 30% Import Dependency ↑ Stable

Vegetable Seeds 28% Share | 68% Import Dependency ↑ High Growth

Cereal Seeds (Wheat/Rice) 22% Share | 25% Import Dependency ↑ Growing

Oilseed & Other Seeds 15% Share | 40% Import Dependency

Sources: Ministry of Agriculture of Uzbekistan 2025 Seed Category Statistics Report; FAO Seed Trade Database 2025 Update; China Seed Trade Association June 2026 Market Analysis

Core Product Supply and Demand

Focus on the two core categories: cotton seeds and vegetable seeds. Uzbekistan's domestic cotton seed breeding system is relatively mature with a self-sufficiency rate of approximately 70%, but high-quality disease-resistant varieties still rely on imports. Vegetable seeds have a high import dependency of 68%, with hybrid seeds almost entirely imported. China holds a significant cost-performance advantage in hybrid tomato and pepper seeds.

Core Category	Self-Sufficiency Rate	Import Volume (tonnes)	Demand Growth
Cotton Seeds	70%	~4,200	+4.5%
Vegetable Seeds (Hybrid)	12%	~2,850	+15.7%
Hybrid Rice Seeds	35%	~1,600	+22.3%

Sources: Ministry of Agriculture of Uzbekistan 2025 Seed Supply and Demand Report; General Administration of Customs of China May 2026 Export Breakdown Data; International Seed Federation (ISF) 2025 Global Seed Trade Overview

Intermediate Goods and Raw Material Value

The core intermediate inputs for seed production are breeder seeds and parent materials. The average cost of hybrid vegetable breeder seeds in China's production regions is approximately USD 45-65/kg, with CIF prices in Uzbekistan (including freight and tariffs) at approximately USD 58-82/kg. Breeding intellectual property fees account for 12%-18% of the landed price for high-end seeds, representing a key factor affecting terminal pricing.

Avg. Breeder Seed Cost in China USD 45-65/kg → Range-bound

Uzbekistan CIF Price USD 58-82/kg ↑ Incl. Freight & Tariff

IP Fee as % of Price 12%-18%

Logistics Cost as % of CIF ~8%-11%

Sources: China Seed Association 2025 Seed Cost Survey Report; Customs Committee of Uzbekistan 2025 Import Tariff Schedule; Argus Media June 2026 Central Asia Logistics Cost Index (prior values carried forward)

Trade and Macroeconomic Indicators

Uzbekistan's GDP grew 5.8% in 2025, with agriculture accounting for approximately 24.6% of GDP. The economy remained stable in 2026, with the government continuing to increase investment in agricultural modernization. China-Uzbekistan bilateral trade exceeded USD 11 billion in 2025, with seed trade benefiting from preferential tariff policies as a key area of agricultural cooperation.

GDP Growth (2025) 5.8% ↑ Robust

Agriculture as % of GDP 24.6%

China-Uzbekistan Bilateral Trade (2025) ~USD 11.2B ↑ +9.2%

USD/Som Exchange Rate (Jul 2026) ~12,850 → Depreciation Pressure

Seed Import Tariff 0%-5% (Preferential Rate)

Sources: World Bank 2025 Uzbekistan Country Report; General Administration of Customs of China 2025 Full-Year Trade Statistics; Central Bank of Uzbekistan July 2026 Exchange Rate Bulletin

Risks and Opportunity Windows

Key risks include continued Som depreciation, instability in Central Asia logistics corridors, and increasing competitiveness of Uzbekistan's domestic seed enterprises. Opportunity windows lie in the government's "Agricultural Modernization 2030" strategy promoting hybrid seed substitution for traditional varieties, deepening China-Uzbekistan agricultural technology cooperation, and urgent demand for drought-tolerant and saline-alkali-tolerant varieties.

> ⚠ Exchange Rate Risk: In H1 2026, the Som depreciated 4.2% against the USD, squeezing importer profit margins; pricing strategy adjustments require close attention.

Opportunity: Hybrid Seed Substitution Target 60% by 2030 ↑ Policy-Driven

Opportunity: Drought-Tolerant Variety Demand Growth >25% p.a. ↑ High Potential

Risk: Increased Local Enterprise Subsidies Intensifying Competition → Monitor Closely

Sources: Presidential Decree of Uzbekistan "Agricultural Modernization 2030" (issued 2025); World Bank Q2 2026 Central Asia Economic Outlook; Economic and Commercial Office of Chinese Embassy in Uzbekistan June 2026 Economic and Trade Brief

Data Sources Summary

1. State Statistics Committee of Uzbekistan — 2025 Annual Agricultural and Trade Statistics Report
2. General Administration of Customs of China — May 2026 Import/Export Commodity Statistics Monthly
3. FAO (Food and Agriculture Organization) — Global Seed Trade Statistics Database, 2025 Update
4. Ministry of Agriculture of Uzbekistan — 2025 Seed Supply-Demand and Category Statistics Report

5. World Bank — Uzbekistan Country Report 2025 and Q2 2026 Outlook

6. China Seed Association — 2025 Annual Industry Development and Cost Survey Report

7. International Seed Federation (ISF) — 2025 Global Seed Trade Overview

8. Central Bank of Uzbekistan — July 2026 Exchange Rate Bulletin

9. Argus Media — June 2026 Central Asia Logistics Cost Index